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FinancialPlanning

Wealthtech Weekly

March 19, 2026

By Rob Burgess
Reporter

Happy Thursday from the frigid Midwest. Looking out the window at the drifting snow, I think back to my travels last week to sunny Miami Beach, Florida for Future Proof Citywide and to New Orleans for the Technology Tools for Today (T3) Conference. At the latter, I spoke with fintech innovators who **unveiled the next generation of advisor tools**.

Also this week:

- Flourish launched a **new mortgage platform** to help RIAs keep assets sticky.
- For Friday the 13th, we collected **client stories that still haunt advisors**.
- Experts behind the T3/Inside Information Software Survey say the **use of AI note-takers is "unprecedented."**

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WEB SEMINAR

The Great Wealth Transfer: Strategies to retain assets, deepen relationships, and lead across generations

Hosted by Financial Planning

Partner Insights from Cetera FINANCIAL GROUP

March 26, 2026 | 2 p.m. ET/11 a.m. PT

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TOP STORIES

TECHNOLOGY

The T3 2026 announcements that wealth managers should know

Libretto, Syntax Data, Advyzon, Kwanti and the Oasis Group were among the major players at the annual conference that announced new and upcoming AI advancements.

- **Flourish launches mortgage platform to help RIAs retain assets**

The RIA technology platform builds on its acquisition of AI-powered liability-optimization fintech Sora Finance last year.

- **Ask an Advisor: What client story still haunts you?**
  Friday the 13th is considered an unlucky day — this year has three. We asked advisors to share their scariest stories of client mistakes.
- **How firms get advisors to adopt new AI tools**
  At the T3 Conference, leaders discussed how showcasing the value of the new tools can help advisors connect with clients.
- **Jump, Zocks top category as AI note-taker adoption soars**
  Nearly half of advisors polled said they use the AI tools in their practice. But the experts behind the survey estimated that the number is already much higher.

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PARTNER INSIGHTS FROM BILL

Bill pay as a service and what RIAs should know

Discover how firms serving HNW and UHNW clients can deliver bill pay with strong controls, compliance awareness, and a clearer view of clients' financial lives.

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